THE SPRING INVESTMENT INSTITUTE FORUM
THE CAROLINA INN, CHAPEL HILL, NC
MAY 18-19, 2020
(Membership Required)

EDUCATIONAL FORUMS THAT INSPIRE
A CULTURE OF COLLABORATION AND
COMMUNITY AMONG INSTITUTIONAL
INVESTORS, FAMILY OFFICES,
CONSULTANTS AND ASSET MANAGERS

FOR MORE INFORMATION ON JOINING OUR COMMUNITY:
WWW.THEINVESTMENTINSTITUTE.ORG
INTRODUCTION TO THE INVESTMENT INSTITUTE

EDUCATIONAL FORUMS THAT INSPIRE A CULTURE OF COLLABORATION AND COMMUNITY AMONG INSTITUTIONAL INVESTORS, FAMILY OFFICES, CONSULTANTS AND ASSET MANAGERS

The Investment Institute (TII) was originally founded in 2008 specifically to educate the investment community in North Carolina as well as other southeastern states. In 2016, we expanded to include investors and managers from around the country, while still maintaining a strong emphasis on the southeast where our roots were formed. TII is an unbiased educational investment conference provider which offers non-commercial investor education and does not offer any other investment products or consulting services. Our membership and conference registration fees, along with our sponsorship contributions, are the sole revenue source of The Investment Institute. TII is co-owned by Andrea Szigethy, Founder & CEO, and Donna Holly, President, who have been working alongside each other as educators in the financial sector for over 18 years! Together they have built an organization that provides their clients a relaxed, comfortable, friendly, and non-sales type of atmosphere, fostering an environment to learn and connect with one another in a way that promotes lifelong relationships, trust and friendship among institutional and private investors, consultants and asset managers. Our meetings are just the right size! We typically limit our attendance at our Fall & Spring (Members Only) Forums, to less than 300 participants to enable members to meet almost everyone over the course of the meeting. As we continue to grow our organization, we welcome new investors into our circle of friends and family and are always interested in meeting and speaking with new niche managers who, when an available spot opens, we can allow access to join our membership community or attend one of our non-member events.

TII brings senior investment decision-makers from leading endowments, foundations, pension funds, single family offices (SFOs), multi-family offices (MFOs), RIAs, consultants, outsourced CIO firms, asset management firms and other financial institutions together for face-to-face conversations, debate and problem-solving. TII has become known as one of the leading conference providers that strives for a high percentage/good ratio of allocators to managers/service providers in the audience at each of the forums. TII features some of the most well-known and leading money managers, policy makers, economists, research strategists and business leadership gurus along with some of the most prominent institutional and private investors. The programs cover complex issues surrounding the financial industry and the speaker faculty analyzes risk while revealing many opportunities in the current market environment.

Our distinguished Editorial Committee, which reflects a cross section of various types of sophisticated institutional and private investors, engage with TII to set the direction and develop the cutting-edge timely topics and themes for all of our forums. It is with their guidance that we develop new and innovative ideas to educate our members. The Editorial Committee assists TII in the recruitment of speakers, drives the content by selecting topics, and also acts as an informal advisory board and strategic resource. It is our goal to keep our investment community abreast of industry practices on a “real-time” basis at each of our programs and to sharpen the understanding of critical factors impacting both long and short-term investment ideas leading to better investment returns.

At TII, we do our best to encourage members not to solicit fellow attendees for investments or services during our forums. Exchanging business cards is entirely appropriate and we specifically dedicate time during the opening evening of each of our forums to bring everyone together for a down-to-earth, relaxed networking dinner in a very comfortable setting, allowing members to get to know one another in a low-key and welcoming way.

A membership subscription is required to gain access to our Spring (May) & Fall (October) Forums. All of our programs are held strictly off-the-record with no media or press in attendance.

www.TheInvestmentInstitute.org
INTRODUCING THE SPRING INVESTMENT INSTITUTE FORUM FACULTY
MAY 18-19, 2020 – THE CAROLINA INN, CHAPEL HILL, NC

SPRING FORUM KEYNOTES

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<tr>
<th>Campbell R. Harvey</th>
<th>Frank Abagnale</th>
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<tr>
<td>Distinguished Professor of Finance Duke University and Research Associate, National Bureau of Economic Research</td>
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<th>Luke Ellis</th>
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<td>Chief Executive Officer Man Group</td>
<td>Professor of Practice Chief Innovation Officer Columbia Business School Founder, 37 Angels</td>
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SPRING FORUM SPEAKERS & PANELISTS

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<th>Heinz Blennemann</th>
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<td>Principal Blennemann Family Investments</td>
<td>Managing Director &amp; Head of Public Policy PIMCO</td>
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<th>Celia Dallas</th>
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<td>Chief Investment Strategist Cambridge Associates</td>
<td>CEO &amp; CIO Inherent Group</td>
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<th>John “Boots” Dunlap</th>
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<td>Vice President and CIO</td>
<td>Chief Investment Officer</td>
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<td>United States Steel Corporation</td>
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<td>TrueBridge Capital</td>
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| Mark W. Yusko | |
|---------------||
MONDAY, MAY 18, 2020 – DAY ONE

10:15 am – 11:00 am
Registration Opens & Networking Time at The Carolina Inn, Chapel Hill, NC

11:00 am – 11:15 am
Welcome and Introduction to the 2020 Spring Investment Institute & Co-Chair Opening Remarks
Andrea Szigethy, Founder & CEO, The Investment Institute
Donna Holly, President, The Investment Institute

11:15 am – 12:10 pm
OPENING KEYNOTE ADDRESS
“Tortured Data” and its Implications for Investors
We all know the saying, ‘if you torture the data long enough, it will confess’. This keynote presentation presents a number of shocking examples of data being tortured in both an academic context and as by investment managers. In the end, the data don’t speak. The interpreter of the data speaks – often with a pre-set agenda. Investors need to be especially vigilant in this era of big data. This presentation will run approximately 35 minutes leaving 20 minutes for Q&A with the audience.
Keynote Speaker: Campbell R. Harvey, Distinguished Professor of Finance, Duke University and Research Associate, National Bureau of Economic Research

12:10 pm – 12:30 pm
Follow-up Interview with Campbell R. Harvey
Interviewer: Mark Yusko, CEO & CIO, Morgan Creek Capital Management & Managing Partner, Morgan Creek Digital Assets

12:30 pm – 1:15 pm
Panel Discussion: Challenges Facing the Industry Today: Investing for the Long Term in an Uncertain World
This group of distinguished investor and manager panelists will share their insights on some of the biggest challenges facing the investment industry today. How are investors preparing to meet the challenge of investing for the long term in an uncertain world? Are there other things when it comes to asset allocation that investors should be doing in addition to hiring good managers? How is asset allocation changing? Are alternative investment strategies still relevant today? What are the key alternative asset classes for growth in 2020 and beyond?
Moderator: Celia Dallas, Chief Investment Strategist, Cambridge Associates
Panelists:
Jonathon King, President & CEO, UNC Management Company
Katherine Molnar, Chief Investment Officer, Fairfax County Police Officers Retirement System
Daniel Roberts, Americas Select Portfolio Manager, Partner, Marshall Wace North America
Donna L. Snider, Managing Director, The Kresge Foundation

1:15 pm – 2:15 pm
Networking Luncheon – Time for Members to Reconnect with One Another
MONDAY, MAY 18, 2020 CONTINUED

2:15 pm – 3:35 pm
Sustainability & Environmental, Social, Governance (ESG) Implementation – Two Special Guest Speakers!
This afternoon’s series of presentations will focus on Sustainability and ESG Implementation. Both Lauren Taylor Wolfe, the Co-founder and Managing Partner from Impactive Capital, and Tony Davis, the CEO and CIO from Inherent Group, will each give a presentation followed by a lively panel discussion moderated by Vanita Gaonkar from Robert Wood Johnson Foundation.

2:15 pm to 2:35 pm ESG Principals, Tracking Progress, Portfolio Examples & The Rising Importance of Disclosure & Engagement for U.S. Public Companies
Guest Speaker: Lauren Taylor Wolfe, Co-Founder & Managing Partner, Impactive Capital

2:35 pm to 3:00 pm Applying an ESG Framework to Equity, Credit & Shorting & Data & Reporting Challenges in the Space
Guest Speaker: Tony Davis, CEO & CIO, Inherent Group

3:00 pm to 3:25 pm ESG Implementation Discussion with Lauren Taylor Wolfe & Tony Davis
Moderator: Vanita Gaonkar, Senior Investment Officer, Robert Wood Johnson Foundation

3:25 pm to 3:35 pm Questions from the Audience

3:35 pm – 4:15 pm
State of the Credit Markets – An Overview Followed by a Fireside Chat

3:35 pm to 3:55 pm 20-Minute Presentation Overview of the Credit Landscape
Guest Speaker: Don Mullen, Founder, CEO & CIO, Pretium Partners

3:55 pm to 4:15 pm Fireside Chat with Don Mullen
Moderated by: TII Editorial Committee Member

4:15 pm – 4:45 pm
Refreshment & Stretch Break

4:45 pm – 5:30 pm LATE AFTERNOON KEYNOTE ADDRESS
The History of the Hedge Fund Business
Hedge funds have been a feature of the investment world since at least the 1950s. Their history has been one of continual reinvention in a Darwinian process which has produced some celebrated winners, but also many losers that closed down without affecting most people’s consciousness. The precedent of history is a good place to start this conversation.
Keynote Speaker: Luke Ellis, Chief Executive Officer, Man Group

5:30 pm – 6:20 pm EVENING KEYNOTE ADDRESS
An Overview of Investing in the Startup Ecosystem: Lessons Learned from Hearing 15,000 Startup Pitches!
Angela will discuss the following in her keynote talk:
-How do angels and VCs evaluate early stage startups?
-How do you diligence a team, a market, and a business model?
-What are questions you should be asking yourself before you start investing in startups?
Keynote Speaker: Angela Lee, Prof. of Practice & Chief Innovation Officer, Columbia Business School & Founder, 37 Angels

6:20 pm TIME TO GET READY FOR OUR DINNER PARTY! (JEANS ARE WELCOME)
Get ready for an evening filled with networking and fun with fellow members of The Investment Institute. You can also use this time to take a short stroll on Franklin Street in Chapel Hill to Kipos Greek Taverna (our dinner venue). Kipos is only a ½ mile (approximately a 12-minute walk) from the hotel and many of you might welcome the walk, and a chance to enjoy the college town of UNC, after a very long day of sitting in sessions! If you would prefer to ride one of our shuttles to Kipos, please meet us outside the front entrance of The Carolina Inn at 6:45 pm. The shuttles will be waiting and ready to go!
MONDAY, MAY 18, 2020 CONTINUED

6:50 pm    SHUTTLES DEPART FROM THE CAROLINA INN TO KIPOS GREEK TAVERNA

7:00 pm – 10:00 pm  WELCOME NETWORKING DINNER PARTY AT KIPOS GREEK TAVERNA ON FRANKLIN STREET!
Address: 431 W. Franklin Street, Chapel Hill, NC 27516 / Website: https://kiposchapelhill.com/

There couldn’t be a more perfect setting on Franklin Street in downtown Chapel Hill to bring our “TII Family Members” together for a fun-filled evening of socializing and getting reacquainted with old friends or making new ones! Don’t miss this special evening where we will have the entire restaurant both inside and outside of this gorgeous dinner venue. **Dress is casual, feel free to wear jeans if you would like.** We are truly grateful to our Investment Institute sponsors who have made this evening possible!

TUESDAY, MAY 19, 2020 – DAY TWO

7:15 am – 8:45 am  “ALLOCATORS/ASSET OWNERS ONLY” – BREAKFAST
**SMALL TABLE TOPIC CONVERSATIONS – THEMED AROUND MANAGER DUE DILIGENCE**

This closed-door session creates the opportunity for allocators to come together to discuss the challenges they face and brainstorm solutions in an intimate and informal atmosphere. This interactive format allows time for candid conversations and enables participants to collaborate with one another over breakfast. It’s a great time for TII investor members to reconnect or meet new members. The room will be set up into 6 smaller groups to allow for easier discussions with one another. Each group will have a facilitator assigned from our TII editorial committee. The objective is to work with your fellow table team members to come up with some questions that you should be asking portfolio managers from funds when considering an investment or getting to know a manager. What do you typically forget to ask a fund manager during the due diligence process? What type of information do you request in the initial meetings? Have you ever asked portfolio managers to share something specific about their sourcing process or what is most frustrating and challenging about their investment process? How do you decline a manager/strategy – do you give a quick no or a slow no? We would like each table to come up with two differentiating questions that you should be asking portfolio managers from funds when considering an investment or getting to know a manager. The facilitator will share it with the rest of the groups. TII will allow one senior investment CIO or Portfolio Manager from each of our sponsoring firms to join in at one of the table discussions so that we can get a manager view and input on the conversations taking place.

**Confirmed Table Facilitators:**
- Heinz Blennemann, Principal, Blennemann Family Investments
- Susanne Gealy, Senior Director, Investments, CommonSpirit Health
- Libby George, Director of Investments, NC State University
- Muthu Muthiah, Chief Investment Officer, Group Health Care
- Mel Williams, General Partner, TrueBridge Capital

8:00 am – 8:45 am  Breakfast Will Be Available For All Other Attendees

8:50 am – 9:40 am  The Profit and Paradox of Monopolies: A Presentation followed by a Panel Discussion

This session will discuss how a surge of research and new books show that monopolies can lead to greater inequality, lower innovation, and higher prices. Yet investors such as Warren Buffett and Peter Thiel have made a career out of investing in them. They argue that investors should only invest in monopolies. How should investors treat stock picking and investing when it comes to monopolies given the tension between their social effects and the kinds of investment returns that come from owning monopolies? This session will lead off with a 20-minute presentation by Jonathan Tepper, the author of *The Myth of Capitalism: Monopolies and the Death of Competition*. Jonathan will set the stage for the discussion and then be joined at 9:20 am by a few panelists to compare and contrast how they think about this issue when investing.

**Guest Speaker:** Jonathan Tepper, Chief Investment Officer, San Blas Capital
**Moderator:** Dan Ward, Chief Investment Officer, Virginia Tech Foundation
**Panelists:** Susanne Gealy, Senior Director, Investments, CommonSpirit Health
Jonathan Tepper, Chief Investment Officer, San Blas Capital
9:40 am – 10:30 am
Why Real Estate Now?
Are investors looking more closely at real estate today? Where should allocators be putting their money when it comes to this asset class? What are the risks and opportunities and the long-term investment horizon? This conversation will address: why debt vs. equity, demographics, student debt and housing as well as other relevant topics from an allocator and debt manager’s perspective. How are allocators looking at real estate today and where are they finding the best opportunities?

Moderator: Bryan Lewis, Vice President and Chief Investment Officer, United States Steel Corporation

Panelists:
John “Boots” Dunlap, Chief Executive Officer & Co-Founder, RRA Capital
Larissa Herczeg, Managing Partner, Oak Street Real Estate Capital
Eric Smith, Chief Executive Officer & Founding Member, Locust Point Capital

10:30 am – 10:45 am
An LP/GP Conversation on Japan

Interviewer: A Member of the TII Editorial Committee

John Trammell, Managing Director, Symphony Financial Partners

10:45 am – 11:00 am
Morning Break

11:00 am – 11:45 am
The Mandate of Heaven: Why China Will Ascend to Global Leadership in the Digital Age
Mark W. Yusko, CEO & CIO, Morgan Creek Capital Management & Managing Partner, Morgan Creek Digital Assets

11:45 am – 12:15 pm
POLITICAL ADDRESS
Politics and Policy in 2020: An Update on the Election
Ms. Cantrill is a managing director and the head of public policy for PIMCO. In this capacity, she helps coordinate the firm’s response to public policy issues and analyzes policy and political events for the firm’s Investment Committee. Ms. Cantrill will provide an overview of the upcoming presidential election, as well as risks and opportunities created by recent developments out of Washington. This discussion will also touch on a wide range of policy issues, such as trade and foreign policy, as well as the resulting implications for financial markets and the global economy.

Guest Speaker: Libby Cantrill, Managing Director & Head of Public Policy, PIMCO

12:15 pm – 1:30 pm
SPECIAL CLOSING KEYNOTE ADDRESS FROM FRANK ABAGNALE!

Catch Me If You Can
Frank Abagnale, Renowned Cybersecurity and Fraud Prevention Expert, Bestselling Author & Subject of Catch Me If You Can

Frank Abagnale is one of the world’s most respected authorities on forgery, embezzlement, and secure documents. For over 40 years he has worked with, advised, and consulted with hundreds of financial institutions, corporations and government agencies around the world. Mr. Abagnale’s rare blend of knowledge and expertise began more than 50 years ago when he was known as one of the world’s most famous con men. His riveting story provided the inspiration for Steven Spielberg’s 2002 film, Catch Me If You Can, starring Leonardo DiCaprio as Abagnale and Tom Hanks as the FBI agent fast on his heels. The Tony-Award winning musical, Catch Me If You Can, directed by the legendary Jack O’Brien, opened on Broadway at the Neil Simon Theatre in April of 2011. “I chose to immortalize him on film because of what he’s done for the country for more than 30 years.” -Steven Spielberg

Mr. Abagnale has been associated with the FBI for over 40 years. He lectures extensively at the FBI Academy and for the field offices of the Federal Bureau of Investigation. He is a faculty member at the National Advocacy Center (NAC) which is operated by the Department of Justice, Executive Office for United States Attorneys. More than 14,000 financial institutions, corporations and law enforcement agencies use his fraud prevention programs. In 1998, he was selected as a distinguished member of “Pinnacle 400” by CNN Financial News - a select group of 400 people chosen on the basis of great accomplishment and success in their fields. In 2004 Mr. Abagnale was selected as the spokesperson for the National Association of Insurance Commissioners (NAIC) and the National Cyber
TUESDAY, MAY 19, 2020 CONTINUED

Security Alliance (NCSA). He has also written numerous articles and books including The Art of the Steal, The Real U guide to identity Theft and Stealing Your Life. “Abagnale’s lecture may be the best one-man show you will ever see.” -Tom Hanks

Mr. Abagnale refuses to accept payment for any of his government work. Today, the majority of his income is derived from consulting with major corporate clients such as LexisNexis, Intuit, AARP, and Experian and his public speaking engagements. Mr. Abagnale has conducted over 3,000 seminars on identity theft, cyber crime and fraud worldwide. Mr. Abagnale works as an advisor to a number of print and technology companies around the world. He spent 20 years as an advisor to the Standard Register Company, creating security features for negotiable instruments, car titles, etc. He spent 10 years as an advisor to the 41st Parameter which developed fraud detection technology, now used in 80 countries around the world and recently purchased by Experian. Today, Mr. Abagnale is an advisor to Trusona (www.trusona.com) in developing the world’s first and only insured authentication platform.

1:30 pm to 3:00 pm
Farewell Closing Luncheon & Cocktail Reception!
End of the 2020 Spring Investment Institute Forum

SPECIAL THANK YOU TO OUR EDITORIAL COMMITTEE!

The Investment Institute would like to thank our Distinguished Editorial Committee Members for their time, guidance, knowledge and commitment to helping us through-out the year as we develop the content and speakers for all of our programs. We are lucky to call you our friends and grateful that you haven’t blocked our emails, texts and phone calls after all of these years! Thanks for your valuable contribution to us and to the entire investment community! We couldn’t do this without you all!

XOXO Andrea & Donna

David Brief, Senior Managing Director, Angeles Investment Advisors
Mary Cahill, Investment Committee, Woodruff Arts Center, Community Foundation for Greater Atlanta & Zeist Foundation
James J. Challen, Senior Vice President/Principal, LCG Associates, Inc.
Mike Condon, Head of Portfolio Management, Fund Evaluation Group (FEG)
Celia Dallas, Chief Investment Strategist, Cambridge Associates
Jim Dunn, CEO & CIO, Verger Capital Management
Robert Durden, CEO/CIO, UVIMCO
Vanita Gaonkar, Senior Investment Officer, Robert Wood Johnson Foundation
Susanne Gealy, Senior Director, Investments, CommonSpirit Health
Libby George, Director of Investments, NC State University
David Gilmore, Managing Director, The Harry and Jeanette Weinberg Foundation
Michael Hennessy, Managing Director, Morgan Creek Capital Management
Brian Hiestand, Chief Investment Officer, The College of William & Mary Foundation
Ray Jacobson, Chief Investment Officer, Davidson College
Beth Johnson, Partner; US Segment Leader for Family Offices & Senior Investment Consultant, Pavilion, a Mercer Practice
Kris Kapoor, Chief Investment Officer, Furman University
Christine Kelleher, Chief of Investments, National Gallery of Art
Jonathon King, President & CEO, UNC Management Company
Don Lindsey, Chief Investment Officer, American Institutes for Research
Katherine Molnar, Chief Investment Officer, Fairfax County Police Officers Retirement System
Muthu Muthiah, Chief Investment Officer, Group Health Foundation
Dan Parker, Deputy Chief Investment Officer, Texas Tech University System
Mark E. Roberts, Chief Investment Officer, Ironsides Asset Advisors
Anne Shelton, Chief Investment Officer, American Trading & Production Corp.
Donna L. Snider, Managing Director, The Kresge Foundation
Mark Steed, Chief Investment Officer, Arizona PSPRS Trust
Daniel Ward, Chief Investment Officer, Virginia Tech Foundation
Mel Williams, General Partner, TrueBridge Capital
Mark W. Yusko, CEO & CIO, Morgan Creek Capital Management & Managing Partner, Morgan Creek Digital Assets

All Editorial Committee Members participate in at least one forum each year.
THANK YOU FOR SUPPORTING OUR MISSION FOR EDUCATION! WE ARE SO GRATEFUL FOR YOUR COLLABORATION, CONTRIBUTION & COMMITMENT TO OUR COMMUNITY!

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ROBIN HOOD
The TII Editorial Committee biographies are included below. Several will have a moderator or panelist role at the Spring Forum. All EC members participate in at least one forum each year and are listed here as a thank you for their contribution to our content development.

Frank Abagnale, Renowned Cybersecurity and Fraud Prevention Expert, Bestselling Author & Subject of Catch Me If You Can
Frank Abagnale is one of the world’s most respected authorities on forgery, embezzlement, and secure documents. For over 40 years he has worked with, advised, and consulted with hundreds of financial institutions, corporations and government agencies around the world. Mr. Abagnale’s rare blend of knowledge and expertise began more than 50 years ago when he was known as one of the world’s most famous con men. His riveting story provided the inspiration for Steven Spielberg’s 2002 film, Catch Me If You Can, starring Leonardo DiCaprio as Abagnale and Tom Hanks as the FBI agent fast on his heels. The Tony-Award winning musical, Catch Me If You Can, directed by the legendary Jack O’Brien, opened on Broadway at the Neil Simon Theatre.

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Mr. Abagnale has been associated with the FBI for over 40 years. He lectures extensively at the FBI Academy and for the field offices of the Federal Bureau of Investigation. He is a faculty member at the National Advocacy Center (NAC) which is operated by the Department of Justice, Executive Office for United States Attorneys. More than 14,000 financial institutions, corporations and law enforcement agencies use his fraud prevention programs. In 1998, he was selected as a distinguished member of “Pinnacle 400” by CNN Financial News - a select group of 400 people chosen on the basis of great accomplishment and success in their fields. In 2004 Mr. Abagnale was selected as the spokesperson for the National Association of Insurance Commissioners (NAIC) and the National Cyber Security Alliance (NCSA). He has also written numerous articles and books including The Art of the Steal, The Real U Guide to Identity Theft and Stealing Your Life.

“Abagnale’s lecture may be the best one-man show you will ever see.” -Tom Hanks
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Heinz Blennemann, Principal, Blennemann Family Investments
(Bio coming soon)

David R. Brief, CFA, Senior Managing Director, Angeles Investment Advisors
David Brief is a leading expert in non-profit management with over 25 years of investment experience. David established the Jewish Federation of Metropolitan Chicago Investment Office in 2002. Under his leadership as Chief Investment Officer, the endowment portfolio evolved from a $350 million internal investment program into a $1.1 billion pool that invested assets belonging to several dozen other non-profits. David has also been a leader in educating non profits on the merits of outsourced investment management. Earlier in his career, David spent eleven years as an investment consultant for three Chicago-based firms: Ibbotson Associates (now part of Morningstar Inc.), Ennis Knupp + Associates (now part of Aon Hewitt Investment Consulting, Inc.), and Capital Resource Advisors (now part of Segal Marco Advisors). Born and raised in New Jersey, David earned a BA degree in Economics from Cornell University, an MBA degree with honors from the University of Chicago, and is a CFA® Charterholder.

Mary Cahill, Investment Committee, Woodruff Arts Center, Community Foundation for Greater Atlanta & Zeist Foundation
Mary L. Cahill is Founder & President of Rivington Capital, an independent partner offering institutional investors a center of excellence on a wide range of topics. Mary serves on the Investment Committee for the Woodruff Arts Center, the Community Foundation for Greater Atlanta, and the Zeist Foundation. Mary was previously Vice President and Chief Investment Officer of Emory University overseeing investments of all endowment, trust, operating, and employee benefit funds of the University and related medical facilities. Prior to joining
Emory, Mary was Deputy Chief Investment Officer of Xerox Corporation. Mary’s entire career has been institutional investing, with prior positions including the Virginia Retirement System, SmithKline, BellSouth and Merck pension plans. Mary has overseen internal equity portfolios, invested fixed income and futures portfolios, built global, multi-asset portfolios, and designed investment options. Mary serves on the Boards of The Woodruff Arts Center and the Robert Toigo Foundation. Mary has served as President of Pension Group East, the NCAA Investment Committee, CIEBA and the NYSE Pension Managers Advisory Committees, and the board of The Institute For Quantitative Research in Finance. Mary has an MBA specializing in Finance from St. John’s University and holds the Chartered Financial Analyst designation.

Libby Cantrill, Managing Director & Head of Public Policy, PIMCO

Ms. Cantrill is a managing director and the head of public policy for PIMCO. In this capacity, she helps to coordinate the firm’s response to public policy issues and analyzes policy and political risk for the firm’s Investment Committee. She is also a member of the firm’s Americas Portfolio Committee. Additionally, she is the co-head of PIMCO’s New York Office and is a founding member of PIMCO Parents and PIMCO Women. Prior to joining PIMCO in 2007, she served as a legislative aide to a member of Congress and also worked in the investment banking division at Morgan Stanley. She has 16 years of investment experience and holds an MBA from Harvard Business School and received her undergraduate degree in economics from Brown University. Ms. Cantrill is a CFA charterholder and a regular contributor to Bloomberg and CNBC. She is also a member of the Council on Foreign Relations.

*James J. Challen, Senior Vice President / Principal, LCG Associates

Mr. Challen joined LCG Associates in 2009 and is a Senior Vice President. His client relationships include corporations, utilities, endowments, and foundations. In addition to lead consultant responsibilities, James conducts capital market and asset class research, investment manager due diligence, and special topical studies. Before joining LCG, James was with Morgan Keegan & Company as First Vice President of the Manager Due Diligence Group. He was responsible for managing a team that made investment recommendations for institutional and private clients. Concurrently, James was a Portfolio Manager for Morgan Keegan & Company’s Private Client Discretionary Program. He previously held several positions with Morgan Keegan & Company including Research Specialist and Research Associate. James began his career as a Financial Analyst at Remtech Services Inc. James is a CFA Charterholder and a member of the CFA Society of Atlanta. He is also a Chartered Alternative Investment Analyst (CAIA) Charterholder. James graduated with a B.S. in Finance from the Leeds School of Business at the University of Colorado.

*Mike Condon, Head of Portfolio Management, Fund Evaluation Group (FEG)

Michael (Mike) A. Condon, CFA is Senior Vice President of Institutional Investments at Fund Evaluation Group, LLC (FEG). Condon works with Endowment and Foundation (E&F) clients within FEG’s outsourced chief investment officer (OCIO) service. A long-time thought leader within the E&F space, Condon brings more than 20 years of experience as an acting CIO. Most recently as CIO at Southern Methodist University, he led a 15-person office and was responsible for all aspects of investing the university’s $1.5 billion endowment. As CIO for the University of Arkansas Foundation, Condon oversaw a $1.1 billion endowment. During his 10-year tenure at Georgia Tech, the foundation endowment grew from $440 million to $1.5 billion. Additionally, Condon is on the Editorial Committee for The Investment Institute, and on advisory Boards for Institutional Investor and Alternative Investment Management, LLC.

*Celia Dallas, Chief Investment Strategist, Cambridge Associates

As Chief Investment Strategist for Cambridge Associates and a Managing Director of the firm, Celia is responsible for formulating our global investment strategy and portfolio construction advice. Since joining Cambridge in 1996, Celia has contributed to a wide range of research initiatives, including serving as one of the main architects of our Risk Allocation Framework and an author of the related report. She is the author of our quarterly publication, VantagePoint, in which she shares our house view and advice. Celia is a regular contributor to other research publications, covering a wide range of capital market, asset allocation, and investment planning topics. She is a frequent presenter and discussion moderator at the firm’s roundtables and various industry conferences. Before joining Cambridge Associates, Celia was a consultant for Harlan Brown & Co, a competitive intelligence consulting firm. In this position, she researched, wrote, and presented market analysis commissioned by Fortune 500 clients on a variety of consumer and industrial products. She also worked for the Employee Benefit Research Institute (EBRI), where she conducted research and wrote reports on retirement income security issues. Celia has an MBA from the Darden School of Business, University of Virginia and a BA from University of Pennsylvania.

Tony Davis, CEO & CIO, Inherent Group

Tony Davis is CEO and CIO of Inherent Group, an investment management firm focused on the equity and credit markets. The firm uses environmental, social, and governance (ESG) factors to source and underwrite investments. Through its engagement with companies, the firm aims to inspire investors and managers to incorporate sustainability into their decisions and to encourage business more broadly to address environmental and social challenges. Prior to Inherent Group, Tony co-founded Anchorage Capital Group, where he was President and served as a Portfolio Manager for all the domestic and offshore funds managed by the firm. From 2010 through 2015, he was President of Anchorage Capital Europe and worked in London. Prior to Anchorage, Tony worked in the Fixed Income, Currency and Commodities division of The Goldman Sachs Group, Inc. Tony is an advocate for educational opportunity and is involved with various organizations to that effect: board member of Achievement First public charter schools, board governor of the Lauder Institute, and contributor to Educate Girls India, Pursuit.org and Bridge International Academies. He is also a board member of Ceres, the corporate and investor environmental advocacy
John “Boots” Dunlap, Chief Executive Officer & Co-Founder, RRA Capital

John “Boots” Dunlap, has over a decade of experience in commercial real estate lending, having consulted and worked for numerous banks, insurance companies, and private equity firms to include Wells Fargo, JPMorgan Chase, Genworth, VärdePartners, and Fortress. During this time, he originated and managed over $750 million in middle-market commercial real estate bridge loans and consulted on $2.4 billion of distressed commercial real estate across the U.S. In addition, Mr. Dunlap developed RRA’s state-of-the-art commercial real estate risk management and predictive valuation software platform (MQi®). He is a member of Urban Land Institute, Mortgage Bankers’ Association, Commercial Real Estate Finance Council, the National Association of Office & Industrial Properties, and various other industry organizations. Prior to founding RRA, Mr. Dunlap was an Infantry Officer in the US Army where he served in multiple combat tours to Iraq and Afghanistan earning him the Bronze Star, two Meritorious Service Medals, Combat Infantryman’s Badge, Ranger Tab, Airborne Wings, and numerous other distinguished leadership decorations. He is a graduate of the University of Virginia.

*Vanita Gaonkar, Senior Investment Officer, Robert Wood Johnson Foundation

Vanita W. Gaonkar is a Senior Investment Officer with the Robert Wood Johnson Foundation, focused on Public Investments. Prior to joining the Foundation, Vanita was the Director of Research at Ehrenkranz Partners, L.P., where she was responsible for investments across asset classes, including fixed income, equities, hedge funds, private equity and real assets. Before joining Ehrenkranz Partners, L.P. she served as a Director in Alternative Investments at Credit Suisse, where she oversaw investments in long/short equity, event driven credit and emerging markets. Prior to Credit Suisse she worked as an analyst at The Blackstone Group and J.P. Morgan Chase. Ms. Gaonkar earned her B.A. in Mathematics and Economics from Wesleyan University, Middletown, Conn.

Robert Durden, CEO/CIO, University of Virginia Investment Management Company (UVIMCO)

Robert Durden is the CEO/CIO of University of Virginia Investment Management Company (UVIMCO). He was previously a Senior Vice President and the Chief Investment Officer at Texas Children’s Hospital. Prior to joining Texas Children’s Hospital in March 2013, Robert was the Managing Director of Private Investments at Morgan Creek Capital Management. There he directed $4.5 billion of private investments across private equity, energy and natural resources, and real estate. Mr. Durden has also worked with Legg Mason/Western Asset Management, Ritchie Capital Management, and Merrill Lynch’s Middle Market M&A group. Robert received his MBA in finance and entrepreneurship, with honors, from the University of Chicago Booth School of Business and his Bachelor of Arts in economics, magna cum laude, from Princeton University. Robert Durden primarily oversees the Texas Children’s Hospital Foundation and other investment assets, totaling approximately $2.7 billion.

Luke Ellis, Chief Executive Officer, Man Group

Luke Ellis is Chief Executive Officer of Man Group, a global active investment firm. Man Group has five investment engines (Man AHL, Man Numeric, Man GLG, Man FRM and Man GPM), which manage USD 112.7 billion (as at 30 September, 2019) in a range of liquid and private markets. With a central objective to deliver alpha for clients through time, Man Group provides a wide range of alternative and long-only portfolio solutions for its client base. As CEO, Luke leads the firm’s Executive Committee, working with teams across investment, distribution, technology and infrastructure, while seeking to deliver the right outcomes for clients and positioning Man Group to adapt to opportunities as markets evolve. Luke joined Man Group in 2010 and was previously President of the firm, responsible for management across investment engines. Prior to this, he was Chairman of Man GLG’s Multi-Manager activities and was Managing Director of Man FRM from 1998 to 2008. Luke was previously a Managing Director at JPMorgan in London and Global Head of the firm’s Equity Derivatives and Equity Proprietary Trading businesses.
*Susanne Gealy, Senior Director, Investments, CommonSpirit Health*

Susanne Gealy is a Senior Director of the investments team at Dignity Health (now CommonSpirit Health) based in San Francisco. She leads the organization's public and hedge fund equity investments. Dignity Health is one of the largest health systems in the US, dedicated to providing quality, compassionate health care. The organization has an $11 billion investment portfolio, allocated across the long term strategic goals, retirement benefits, endowment, and insurance. Prior to joining Dignity Health, Susanne spent 10 years at the Teacher Retirement System of Texas, in Austin, a $150 billion retirement plan. At TRS, she was responsible for the $26 billion external equity investment program comprising US, international, emerging markets, and global equity managers. Before joining TRS, Susanne worked in New York at Investcorp, Lazard Asset Management, a family office, and Banc of America Securities. She began her career in finance at JP Morgan in equity derivatives. Prior to attending business school, Susanne worked in the field of structural engineering in San Francisco. Susanne holds an M.B.A. from the University of Chicago’s Booth School of Business. She has a M.S. and B.S. in Engineering from the University of Texas at Austin. Susanne is a board member of Trinity Charter School, a Texas charter school district dedicated to the educational needs of abused children.

*Libby George, Director of Investments, NC State University*

Libby George is currently the interim Associate Vice Chancellor for Finance and Business, Assistant Treasurer, and Director of Investments at North Carolina State University accumulating over 30 years of experience in investment management, corporate, educational, and financial accounting. Prior to becoming Director of Investments, Ms. George was the Manager of Financial Reporting where she was responsible for the financial reporting, capital assets, cash management, debt, and taxes of North Carolina State University. Libby currently manages five portfolios at NC State with assets in excess of $1.5 billion in short term, intermediate term, charitable giving, traditional long-term endowment assets as well as long-term endowment assets invested in a sustainable responsible and impactful manner. Libby is an officer of the NC State Investment Fund, Inc. In addition, Ms. George is currently on the editorial committee of The Investment Institute, member of the CAP Trust/UNC 403B Investment Committee, and a member of 100 Women in Hedge Funds. Ms. George previously served on the State of North Carolina’s Supplemental Retirement Board of Trustees as appointed by Governor Beverly Perdue in July 2009 and was the Chair of the Investment Subcommittee of the Supplemental Retirement Board. Libby was a NC State University Award for Excellence Nominee in 1991, received the Pride of the Wolfpack Award in 2003, named one of the 125 Transformational Women of NC State in 2013, and in 2019, received the Rodney H. Adams Endowment Management Award from NACUBO (National Association of College and Business Officers) for outstanding individual contributions to professional development activities related to University Endowment and Investment Management. Libby has been involved in the community through her church in various capacities such as Wake Interfaith Hospitality Network and past chair of the Permanent Endowment Committee. She received her Bachelor of Science degree in Accounting from Auburn University and was an All-American NCAA athlete in Swimming for the Auburn Tigers. She became a Certified Public Accountant in 1992.

*David Gilmore, Managing Director, The Harry and Jeanette Weinberg Foundation*

David Gilmore joined The Harry and Jeanette Weinberg Foundation in 2014 to help build the investment office. The Foundation has $2.8 billion in assets and makes over $100 million in grants each year. David is responsible for the design and implementation of the Foundation’s asset allocation, investment manager selection and risk management. Prior to joining the Foundation, David served in several senior roles at The Ohio State University investment office which managed $3.5 billion. David was previously a partner at Gerber/Taylor Capital Advisors. David earned his MBA from Baylor University and an MBA with a concentration in Finance from the University of Memphis. David holds the Certified Financial Planner™ professional (CFP®) designation and the Chartered Alternative Investment Analyst (CAIA) designation.

Campbell R. Harvey, Distinguished Professor of Finance, Duke University and Research Associate, National Bureau of Economic Research

Campbell R. Harvey is a Canadian economist. He is a Distinguished Professor of Finance at the Fuqua School of Business, Duke University and a Research Associate of the National Bureau of Economic Research in Cambridge, Massachusetts. He served as President of the American Finance Association in 2016. Professor Harvey obtained his undergraduate degree from Trinity College at the University of Toronto. He obtained his doctorate at the University of Chicago in business finance where his thesis discovered the power of the yield curve to predict economic recessions. He has served on the faculties of the Stockholm School of Economics, the Helsinki School of Economics, and the Booth School of Business at the University of Chicago. He has also been a visiting scholar at the Board of Governors of the Federal Reserve System. He has published over 140 scholarly articles on topics spanning investment finance, emerging markets, corporate finance, behavioral finance, financial econometrics and computer science. He has received numerous best paper awards. He is a Fellow of the American Finance Association. Harvey is a Founding Director of the Duke-CFO Survey. This widely watched quarterly survey polls over 1,500 CFOs worldwide. Harvey edited The Journal of Finance – one of the three leading scientific journals in his field and one of the premier journals in the economic profession from 2006-2012. His publications can be found at [http://people.duke.edu/~charvey/research.htm](http://people.duke.edu/~charvey/research.htm). Follow him on LinkedIn: [https://www.linkedin.com/in/camharvey/](https://www.linkedin.com/in/camharvey/)

*Mike Hennessy, Managing Director, Morgan Creek Capital Management*

Mike Hennessy is a Co-founder of Morgan Creek Capital Management and serves as the Director of Investments. In this role, Mr. Hennessy provides oversight to the Private Investments Group, and acts as a Portfolio Strategist on portfolios beyond private investments, including work with Morgan Creek’s advisory clients and proprietary funds. Prior to joining Morgan Creek in 2004, Mr. Hennessy was Vice President and a founding member of UNC Management Company. Primary areas of responsibility included domestic equity, international and emerging
markets equity, opportunistic equity, absolute return, fixed income, enhanced fixed income and private investments. Mr. Hennessy also assisted in developing overall investment objectives as well as strategic and tactical asset allocation for the funds. Mr. Hennessy was responsible for monitoring both public and private individual managers and overall portfolio performance, as well as risk management. Prior to joining UNC in 1999, Mr. Hennessy was an Investment Director at Duke Management Company (Duke University) where he assisted in the management of multi-billion portfolios across all asset classes of various University-related investment pools. Before joining Duke in 1991, Mr. Hennessy was an Associate at Amundi Smith Breeden Associates, a quantitative investment management firm based in Durham, NC. Mr. Hennessy received his Master of Business Administration with a concentration in Finance from the Fuqua School of Business at Duke University and he also holds a Bachelor of Science Degree in Philosophy, Psychology and Mathematics from the College of William and Mary. Mr. Hennessy is a Trustee of Duke University Federal Credit Union, a member of the Investment Committee at the Carolina Friends School, a director of the Morgan Creek Foundation, Emeritus Trustee of the College of William & Mary Foundation Board of Trustees, and former member of its Executive Committee and Investment Committee (immediate past Chair), and a Trustee of the Murray 1693 Scholars Foundation.

Larissa Herczeg, Managing Partner, Oak Street Real Estate Capital
Larissa Herczeg is a Managing Partner of Oak Street Real Estate Capital, LLC and a member of the firm’s Investment Committee. Ms. Herczeg is responsible for all aspects of Oak Street’s Seeding & Strategic Capital business, including investment sourcing, due diligence, selection and portfolio management and reporting. Ms. Herczeg focuses on sourcing, due diligence, investment monitoring and serving on advisory boards for Oak Street’s SASc business. Select activities include co-founding Women in Real Estate, serving as a Trustee of Roosevelt University and a mentor for the Goldie B. Wolfe Miller Women Leader’s In Real Estate Initiative, a mentor for the Toigo Foundation and has served as a guest speaker at the University of California-Berkeley, Kellogg School of Management and the University of Notre Dame. Prior to Oak Street, Ms. Herczeg was responsible for global real estate investing at Morgan Creek Capital Management, Franklin Templeton Real Estate Advisors and the Credit Suisse Customized Fund Investment Group (now known as GCM Grosvenor). Ms. Herczeg received a B.A. with honors in Government and Economics from the University of Notre Dame, a Master’s degree with honors in International Affairs from Columbia University’s School of International and Public Affairs and a Juris Doctor degree with honors from Columbia University Law School.

*Brian Hiestand, Chief Investment Officer, The College of William & Mary Foundation
Brian joined The College of William and Mary Foundation in 2005 to serve as its first Chief Investment Officer overseeing all of the investment management functions for the endowment including asset allocation and manager selection and review. Chartered in 1693, by King William III and Queen Mary II of England, The College of William and Mary is the second oldest college in America. Prior to joining William and Mary, Brian was the first Director of Alternative Investments for the Indiana University Foundation in Bloomington, Indiana, where he launched their Alternative Investment Program, including allocations to hedge funds, venture capital, private equity, and timberland. Prior to joining the I.U. Foundation, Brian was a Principal and Portfolio Manager at Harris Investment Management in Chicago. In 2011, Brian received the Institutional Investor Small Endowment of the Year Award. Brian received his B.S. and M.B.A. from Bowling Green State University.

*Donna Holly, President, The Investment Institute, LLC
Donna Holly is the President of The Investment Institute, an educational membership organization founded in 2008 for institutional and private investors, managers and financial professionals. Previously, Donna was Director of Events Marketing at Morgan Creek Capital Management. Donna joined Morgan Creek in 2008 after working as a freelance consultant on educational events for the firm for two years. Prior to joining Morgan Creek, Donna worked at SAB Capital on the client relations and marketing team where she was responsible for overseeing the integration of the client relationship management system company-wide and providing performance and subscription documents to investors. Donna worked from 2002 to 2006 as the Director of Client Service and Project Management at NMS Management, Inc., an educational conference company designed to service the endowment, foundation and high net worth communities. Donna spent eight years as an advertising agency producer, developing TV and radio commercials for national clients, first at Wells Rich Greene BDDP and later at Ammirati Puris Lintas. She received her Bachelor of Arts degree in English from the University of Florida and is now, along with her husband, studying the development and care of chickens in her own backyard, after a culture-shock producing move to Roswell, Georgia after 19 years in Manhattan.

*Ray Jacobson, Chief Investment Officer, Davidson College
Ray Jacobson is the Chief Investment Officer at Davidson College, a highly selective independent liberal arts college for 1920 students located 20 minutes north of Charlotte, NC. Ray joined the college in the summer of 2008 and oversees all aspects of the college’s $800+ million endowment. Prior to Davidson, he served as the first investment officer for the Golden LEAF Foundation, a nonprofit established to increase economic opportunities in North Carolina’s rural and tobacco-dependent communities. Mr. Jacobson began his endowment career in 2001 as an Investment Manager at DUMAC, the investment office for Duke University. Earlier in his career, he worked at Bloomberg Financial Markets in Princeton, NJ and interned at Brown Advisory in Baltimore, MD. He received an M.B.A. from Duke University, an M.S. from Clemson University, and a B.A. from Rutgers University. He is also a CFA charterholder and serves on the Board of the Woodlawn School and The Pines at Davidson. Ray lives in the town of Davidson with his wife and four children.
Angela Lee is an educator & entrepreneur. She serves as Professor of Practice and Chief Innovation Officer at Columbia Business school where she teaches top-rated courses in venture capital and leadership. She was voted top three faculty by students in 2018. Angela started her career in product management and then was a strategy consultant at McKinsey. She has started 4 startups and is also the founder of 37 by minorities and women. Lewis earned a master’s degree in business administration from the University of Miami and holds a bachelor’s degree in economics from the University of Maryland at College Park. United States Steel Corporation, headquartered in Pittsburgh, Pa., is a top-rated company in its field.
Dan Parker is the Deputy Chief Investment Officer for Texas Tech University, and is based in Austin, Texas. In this role, he shares broad responsibilities for policy, strategy, asset allocation, structure and processes across the organization and the portfolio, in addition to driving the endowment’s investments in public and private equity, diversifying and absolute return strategies, real assets and natural resources. Before relocating to Austin to join Texas Tech, Dan worked in New York as an Investment Officer with Helmsley Charitable Trust, as a Vice President in private equity with BlackRock and as an Associate in investment banking at Citigroup. He began his career serving as a US Marine, where he commanded infantry and reconnaissance units. He holds degrees from Tulane University and The College of William and Mary.

Muthu Muthiah, Chief Investment Officer, Group Health Foundation

Muthu oversees the strategic and sustainable growth of Group Health Foundation’s investments—stewarding our financial assets to create returns that advance our mission. Muthu is a seasoned asset management professional, with experience investing globally across various asset classes, including private equity, venture capital, real estate, real assets, and both public and private investments in emerging economies. He has led investment teams and strategies at Emory Investment Management, Covariance Capital Management, the University of Richmond, the State Board of Administration of Florida, and RSM Equico. Outside of work, Muthu reads a lot of nonfiction books, stays active by bicycling or jogging, and enjoys watching Tamil movies. He also likes to travel, including visiting his family and community in India. Muthu holds a BHM from Mangalore University and an MBA from Rollins College.

Katherine Molnar, Chief Investment Officer, Fairfax County Police Officers Retirement System

Ms. Molnar joined Fairfax County Retirement Systems in 2013 and currently serves as Chief Investment Officer of the Fairfax County Police Officers Retirement System, a $1.5 billion plan. Her responsibilities include all aspects of portfolio management and oversight, including strategic and tactical asset and risk allocation, selection and supervision of external investment managers and risk management. From 2001 until 2012, Ms. Molnar was Vice President, Senior Research Analyst at AIG Investments’ Hedge Fund Solutions Group – both in London and New York. At AIG Investments, Ms. Molnar was responsible for due diligence procedures and research including: sourcing new managers, monitoring current hedge funds, analyzing portfolio risk and performance, making new investment recommendations to an investment committee as well as hedge fund asset allocation recommendations for portfolio construction. She was additionally responsible for portfolio reviews and overall asset allocation recommendations for external client portfolios. Previously, she was Vice President, Market Research Analyst at Citigroup Investments’ Alternative Investment Strategies group. Prior investment management experience includes positions at Paribas Asset Management as well as Trevor Stewart Burton & Jacobsen. Additionally, Ms. Molnar spent one year in Warsaw, Poland launching the first retail mutual funds available to the Polish market as well as two years in Frankfurt, Germany as an intern with J.P. Morgan. Ms. Molnar received a B.S. in Business Administration/Finance from the University of North Carolina at Chapel Hill. She is a CFA charter holder.

Don Mullen, Chief Executive Officer, Pretium Partners

Don Mullen is the Founder and Chief Executive Officer of Pretium, where he leads the Firm and is responsible for ensuring adherence to its investment philosophy, communicating closely with clients regarding products and strategies, and contributing his experience to strategic decisions surrounding investments and corporate direction. Mr. Mullen was a Partner of Goldman Sachs until February 2012 when he left to found Pretium. At Goldman, Mr. Mullen was a member of the Management Committee. He was Head of the Securities Division’s Global Credit and Mortgage businesses, a member of the Firmwide Risk Committee, and chaired the Principal Investments Committee. He also served on the Securities Division Executive Committee, the Firmwide Capital Committee, and the Public Policy Committee. Prior to joining Goldman in 2001, Mr. Mullen was a Senior Managing Director and Global Head of Credit at Bear Stearns, where he served on the Board of Directors and Management and Compensation Committees. Mr. Mullen is a member of the Firm’s Executive Committee. He received a BA in Economics from Yale University, where he is an active member of the Development Board. Additionally, he serves on the board of the Friends of the High Line.

*Don Lindsey, Chief Investment Officer, American Institutes for Research

Don joined the American Institutes for Research in November 2014 in the role of chief investment officer. Prior to joining AIR, he was the chief investment officer for The George Washington University where he was responsible for management of the university’s $1.5 billion endowment for eleven and a half years. In 2000, Don formed the University of Toronto Asset Management Corporation which managed the university’s endowment, defined benefit plan and operating funds. He began his investment career with the University of Virginia where he served as investment analyst, senior investment officer, assistant director of investments and director. Don earned a Bachelor of Arts in Political Science from Virginia Tech, a Master of Business Administration from James Madison University and a Master of International Policy and Practice from The George Washington University. He is a CFA charter holder and a member of the Washington CFA Society. Don is a member of the investment advisory committee of the Virginia Retirement System.

*Katherine Molnar, Chief Investment Officer, Fairfax County Police Officers Retirement System

Ms. Molnar joined Fairfax County Retirement Systems in 2013 and currently serves as Chief Investment Officer of the Fairfax County Police Officers Retirement System, a $1.5 billion plan. Her responsibilities include all aspects of portfolio management and oversight, including strategic and tactical asset and risk allocation, selection and supervision of external investment managers and risk management. From 2001 until 2012, Ms. Molnar was Vice President, Senior Research Analyst at AIG Investments’ Hedge Fund Solutions Group – both in London and New York. At AIG Investments, Ms. Molnar was responsible for due diligence procedures and research including: sourcing new managers, monitoring current hedge funds, analyzing portfolio risk and performance, making new investment recommendations to an investment committee as well as hedge fund asset allocation recommendations for portfolio construction. She was additionally responsible for portfolio reviews and overall asset allocation recommendations for external client portfolios. Previously, she was Vice President, Market Research Analyst at Citigroup Investments’ Alternative Investment Strategies group. Prior investment management experience includes positions at Paribas Asset Management as well as Trevor Stewart Burton & Jacobsen. Additionally, Ms. Molnar spent one year in Warsaw, Poland launching the first retail mutual funds available to the Polish market as well as two years in Frankfurt, Germany as an intern with J.P. Morgan. Ms. Molnar received a B.S. in Business Administration/Finance from the University of North Carolina at Chapel Hill. She is a CFA charter holder.

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*Muthu Muthiah, Chief Investment Officer, Group Health Foundation

Muthu oversees the strategic and sustainable growth of Group Health Foundation’s investments—stewarding our financial assets to create returns that advance our mission. Muthu is a seasoned asset management professional, with experience investing globally across various asset classes, including private equity, venture capital, real estate, real assets, and both public and private investments in emerging economies. He has led investment teams and strategies at Emory Investment Management, Covariance Capital Management, the University of Richmond, the State Board of Administration of Florida, and RSM Equico. Outside of work, Muthu reads a lot of nonfiction books, stays active by bicycling or jogging, and enjoys watching Tamil movies. He also likes to travel, including visiting his family and community in India. Muthu holds a BHM from Mangalore University and an MBA from Rollins College.

*Dan Parker, Deputy Chief Investment Officer, Texas Tech University System

Dan Parker is the Deputy Chief Investment Officer for Texas Tech University, and is based in Austin, Texas. In this role, he shares broad responsibility for policy, strategy, asset allocation, structure and processes across the organization and the portfolio, in addition to driving the endowment’s investments in public and private equity, diversifying and absolute return strategies, real assets and natural resources. Before relocating to Austin to join Texas Tech, Dan worked in New York as an Investment Officer with Helmsley Charitable Trust, as a Vice President in private equity with BlackRock and as an Associate in investment banking at Citigroup. He began his career serving as a US Marine, where he commanded infantry and reconnaissance units. He holds degrees from Tulane University and The College of William and Mary.
Daniel Roberts, Americas Select Portfolio Manager, Partner, Marshall Wace North America

Daniel Roberts is the Portfolio Manager of the Americas Select sub-strategy of the MW Eureka Fund. Daniel joined Marshall Wace in 2005 as an investment analyst on the MW Europa strategy, heading up the Fund’s research team from 2009. Daniel was made a partner in 2011 and played a leadership role in the development of the firm’s global research processes. In 2013, Daniel re-located to the U.S. to manage his portfolio and to oversee the build out of Marshall Wace’s Fundamental strategies in the region. In 2017, Daniel spearheaded the development of Marshall Wace’s Quantamental capabilities, preparing the ground for the embedding and utilization of alternative data within the Fundamental investment processes of the Firm. Prior to joining Marshall Wace Daniel worked for five years as an equity analyst at Fidelity Investments in London covering a number of sectors on a pan-European basis. Prior to this he worked as an equity analyst and assistant strategist for Quilter & Co., and was also employed at Merrill Lynch & Co. as a graduate trainee. Daniel graduated with a BSc (Econ.) Government from the London School of Economics.

*Mark E. Roberts, Chief Investment Officer, Ironsides Asset Advisors

Mark E. Roberts, CFA serves as the Chief Investment Officer for Ironsides Asset Advisors, LLC, as well as a Managing Director for the Tuscarora Company (a family office). Immediately preceding that, Mr. Roberts was the Director of Global Equities and Hedged Strategies for the North Carolina Retirement Systems where he and his team were responsible for the management of the $33 billion Global Equity and Hedge Fund portfolios for the State of North Carolina. Additionally, Mr. Roberts has served as Chief Investment Officer for families and provided consulting services for endowments and foundations in both asset allocation, manager due diligence and portfolio construction. Earlier in his career, Mr. Roberts served as Director of Risk Management for Centura Bank and had asset – liability management responsibilities. Mr. Roberts received his Master of Science degree in finance from Virginia Commonwealth University and a Bachelor of Science degree from the Galloway School of Business at Wake Forest University. Mr. Roberts serves on the Wake Forest Institute for Regenerative Medicine Philanthropic Advisory Board. Mr. Roberts is the past Chairman of the Board for the NC State Investment Fund and still serves on the fund’s board. He is a member of the North Carolina Society of Financial Analysts and the American Finance Association. Mr. Roberts has served on multiple non-profit boards.

*Anne Shelton, Chief Investment Officer, American Trading and Production Corporation (Atapco)

Anne Shelton joined Atapco, a multi-generational single family investment company, as Chief Investment Officer in July 2017. Previously, Ms. Shelton was Deputy Chief Investment Officer of American Red Cross and led the team investing in all types of alternative investments including private equity, distressed debt, real estate, real assets, and hedge funds. Prior to working at American Red Cross, Anne was Director of Absolute Return at Cornell University and worked at McKinsey in the Corporate Finance and Strategy Practice. Anne serves on the board and finance/investment committee of YWCA National Capital Area. A CFA charterholder, Anne is active in the CFA Society of Washington DC where she has served as a board member, on the programming committee, on the nominating committee, and currently serves on the finance committee. Anne earned a B.S. with distinction in Operations Research & Industrial Engineering from Cornell University and a M.B.A. with distinction in Finance and Marketing from New York University Stern School of Business.

Eric Smith, Chief Executive Officer & Founding Member, Locust Point Capital

Eric Smith is the Chief Executive Officer and a founding member of Locust Point Capital. In 2016, under Mr. Smith’s leadership, Locust Point Capital launched its first institutional private debt fund focused on the senior housing and care industry. Mr. Smith is responsible for establishing the foundation of the firm’s core investment philosophy. In addition, his extensive contacts and his strong understanding of senior housing debt markets have been a driving force in elevating Locust Point Capital to become a nationally recognized senior housing debt platform. With more than two decades of structured finance experience, Mr. Smith has spent the last 25 years originating, underwriting, and managing investments in long-term care, seniors housing, and healthcare services sectors. He has served as a partner/principal in seven prior healthcare investment funds. Throughout his career, Mr. Smith has participated in over 350 transactions representing approximately $1.4 billion in senior debt, mezzanine, and preferred equity investments within the long-term care, senior housing and healthcare services industries. Mr. Smith holds a B.A. in Economics from Allegheny College.

*Donna L. Snider, Managing Director, Kresge Foundation

Ms. Snider joined The Kresge Foundation in 2009. Donna has responsibility for evaluating investment opportunities across all asset classes as well as oversight for the internal trading activity. Prior to joining Kresge, Donna was a director in the Global Markets and Investment Banking division of Merrill Lynch in New York. During her seven years with Merrill Lynch, she covered institutional investors for structured credit, rates and equity products, as well as corporate issuers for their balance sheet hedging activity. Prior to Wall Street, Donna was a pension actuary with Towers Perrin (now Towers Watson) in Chicago. Donna is a member of the board of the Presbyterian Villages of Michigan Foundation and heads the investment committee for First Foundation. She also currently serves on several advisory committees for various private partnerships. Donna earned her MBA with concentrations in accounting and analytical finance from the University of Chicago Booth School of Business; she holds a Bachelors of Science in Mathematics from the University of Notre Dame, Magna Cum Laude, Phi Beta Kappa; professional designations include CFA charter holder and an Associate of the Society of Actuaries.
Mr. Steed recently concluded a four-year stint as a forecaster for the distinguished Good Judgment Project, led by Dr. Phil Tetlock at UPenn, and recently published the first guest-post on the popular decision science blog Farnam Street. Prior to Arizona PSPRS, Mr. Steed worked in Banking at JP Morgan Chase. Mr. Steed graduated with a Masters of Science degree in Predictive Analytics from Northwestern University. He also has an MBA from Thunderbird’s School of Global Management (Jost Henkel Scholar) and received his BA (with honors from Sigma Iota Rho) in Latin American Studies and Business Management from Brigham Young University.

*Mark Steed, Chief Investment Officer, Arizona PSPRS Trust*

Mark Steed is Chief Investment Officer for Arizona PSPRS, a public pension plan with approximately $9 billion in AUM. Over the last 10 years at Arizona PSPRS, Mr. Steed has managed Private Equity, Venture Capital, Absolute Return, Opportunistic Credit, Public Equity, Global Trading Strategies and Real Estate portfolios. His creative approach and notable performance across disparate asset classes won him recognition as a “Rising Star” by Money Management Magazine and, later, “Asset Allocator of the Year” by Institutional Investor. Mr. Steed recently concluded a four-year stint as a forecaster for the distinguished Good Judgment Project, led by Dr. Phil Tetlock at UPenn, and recently published the first guest-post on the popular decision science blog Farnam Street. Prior to Arizona PSPRS, Mr. Steed worked in Banking at JPMorgan Chase. Mr. Steed graduated with a Masters of Science degree in Predictive Analytics from Northwestern University. He also has an MBA from Thunderbird’s School of Global Management (Jost Henkel Scholar) and received his BA (with honors from Sigma Iota Rho) in Latin American Studies and Business Management from Brigham Young University.

*Andrea Szigethy, Founder & CEO, The Investment Institute, LLC*

Andrea is the Founder and CEO of The Investment Institute, an educational membership organization founded in 2008, for investors and managers. Previously, Andrea Szigethy was a Principal and Director of Marketing and Branding for Morgan Creek Capital Management from 2006-2016 where she led the branding, public relations, client education, events and marketing efforts for the firm. Andrea is one of the founding members of the North Carolina Chapter of 100 Women in Finance. Andrea also is a member of the Development Committee at Hope Reins of Raleigh, a wonderful Ranch where struggling kids, aged 5-18, find hope and healing from emotional traumas including the death of a parent, abuse of any kind, anxiety, etc. by working with equine counselors. Andrea also holds a position on the board of The Morgan Creek Foundation as well as on the Advancement Committee for the Hill Learning Center located in Durham, NC who provides services to children who have learning differences. Prior to joining Morgan Creek, Ms. Szigethy was the President of NMS Management, Inc., an educational investment conference company providing unbiased forums for endowments, foundations, family office executives and high net worth individuals. Ms. Szigethy spent six years at NMS in positions of increasing responsibility, concluding in her role as President of the firm. She managed all aspects of conference production, research and development, sales, marketing and relationship management. Prior to NMS, Ms. Szigethy had six years of conference management to include supervision and development across marketing and operations functions in multiple market sectors including the healthcare, biotech and pharmaceutical industries. Ms. Szigethy received her Bachelor of Arts Degree with dual concentration in Business Administration and Psychology from the State University of New York at Albany and continuing credits towards a Master of Arts in Social Work from Adelphi University.

Jonathan Tepper, Chief Investment Officer, San Blas Capital & Founder of Variant Perception

Jonathan Tepper is the Chief Investment Officer of San Blas Capital. He is a founder of Variant Perception, a macroeconomic research group that caters to asset managers. Occasionally, he writes books. He is co-author of The Myth of Capitalism: Monopolies and the Death of Competition, Endgame: The End of the Debt Supercycle, and Code Red, a book on unconventional monetary policy. Earlier in his career, Jonathan worked as an equity analyst at SAC Capital and as a Vice President in proprietary trading at Bank of America. With his friend and partner Turi Munthe, they founded Demotix, a citizen-journalism website and photo agency that received photographs from freelance journalists and amateurs and marketed them to the mainstream media. They sold Demotix in 2012 to Corbis, a company then-owned by Bill Gates. He earned a BA with Highest Honors in History and Honors in Economics from the University of North Carolina at Chapel Hill, and a M.Litt. in Modern History from Oxford University. Jonathan is a Rhodes Scholar and is Chairman of the Rhodes Scholars in Britain.

John Trammell, Managing Director, Symphony Financial Partners

John Trammell is with Symphony Financial Partners as Managing Director, Global Strategic Relationships. Symphony is a Tokyo based Japanese deep value equity investor. John is currently the President of the NY Episcopalian Diocesan Trust. Trammell also serves on the Investment Committee of Episcopal Diocese of New York, is a member of the Investment Committee of Somerset Hills Learning Institute and St. James Parish. He is also a member of the Advisory Board at Tiedemann Investment Group. He was previously the Global Co-Head of Asset Management at Cantor Fitzgerald Investment Advisors from December 2011 until 2015. Prior to joining Cantor, Mr. Trammell was the CEO of Cadogan Management, LLC, an asset management firm, a position he held from September 2007. Prior to joining Cadogan, he spent seven years at Investor Select Advisors, a hedge fund investment platform, where he served as the Chief Executive Officer. Mr. Trammell joined Investor Select Advisors from Argonaut Capital Management in New York, a global macro hedge fund, where he was Chief Operating Officer. Mr. Trammell began his career with the Hudson Institute, a New York-based think tank, where he served as a primary economic research assistant to Herman Kahn, the founder and a noted strategit. Mr. Trammell received a BA in History and Economics from DePauw University and studied at Waseda University in Tokyo, Japan. Mr. Trammell has also spent time as a MD / Institutional Sales with Solovis, LLC., an institutional money management and analytics software platform. Prior to Solovis, Mr. Trammell was a member of the management committee at Novus Partners, a financial technology firm utilizing both public and private data for portfolio analytics. Mr. Trammell is the co-author of several books and has written numerous articles for publication.

*Daniel Ward, Chief Investment Officer, Virginia Tech Foundation*

Mr. Ward joined the Virginia Tech Foundation in April 2008 where he serves as its Chief Investment Office - Endowment. He leads all aspects of managing the Foundation’s portfolio including manager and investment selection and setting asset allocation policy. Almost 50% of the portfolio is invested internationally including a mix of niche and direct investments. The Virginia Tech endowment performance consistently ranks in the top 25% of its peers and was honored by Institutional Investor as the top mid-sized endowment of 2011. The Foundation currently...
oversees approximately $1.7 Billion in operating funds and long-term endowment funds which support Virginia Tech University. Prior to joining Virginia Tech he was the director of research for Integritas Advisors, a family office, from July 2004 – April 2008. Mr. Ward holds a BBA from The University of Michigan Business School, a MBA from The University of Florida Warrington College of Business and is a CFA charterholder.

*Mel Williams, General Partner, TrueBridge Capital*

Mr. Williams was a vice president of UNC Management Company from 2001 to 2007. At UNC Management Company, Mr. Williams was part of the senior team that managed the $2.1 billion endowment for UNC-Chapel Hill and affiliates. Mr. Williams had primary responsibility for UNC’s portfolio of investments in venture capital, leveraged buyouts, restructurings, real estate, oil and gas, and distressed debt. As part of his responsibilities, Mr. Williams oversaw a venture capital portfolio of approximately $250 million in commitments to 27 managers. In this role Mr. Williams also served on the advisory boards of several private capital partnerships. Mr. Williams is a frequent speaker at global conferences on private equity investing and a guest lecturer on portfolio management theory and private equity investing at the Fuqua School of Business at Duke University and the UNC Kenan-Flagler Business School. Prior to his career at UNC Management Company, Mr. Williams spent over five years in the private equity industry as a successful venture-backed entrepreneur and an entrepreneur-in-residence at Commonwealth Capital Ventures in Boston. Mr. Williams was previously a manager with the General Electric Capital Company and the General Electric Corporate Audit Staff. Mr. Williams received his MBA from Harvard University after graduating cum laude with a BA in Economics from UNC-Chapel Hill. In October 2012 Mr. Williams was named an honorary Kauffman Fellow by the Center for Venture Education, in appreciation of TrueBridge’s contribution and commitment to the Kauffman Fellows Program. Mr. Williams currently serves on the UNC Board of Visitors.

Lauren Taylor Wolfe, Co-Founder & Managing Partner, Impactive Capital

Lauren Taylor Wolfe is co-founder and Managing Partner of Impactive Capital, an impact focused active engagement fund. Prior to that she spent 10 years at Blue Harbour Group, a $3.5 Bn activist investment firm, where she was a Managing Director and Investing Partner. Focused primarily on select sectors including, Technology, Consumer, Business and Healthcare Services, Lauren led many of the firm’s investments. Prior to joining Blue Harbour in 2007, Lauren was a Portfolio Manager at SIAR Capital, where she invested in small capitalization public companies, private companies, as well as other outside investment managers. Lauren began her career at Diamond Technology Partners, a strategic technology consulting firm. Lauren received an M.B.A. from The Wharton School at University of Pennsylvania and a B.S. magna cum laude from Cornell University. Lauren is active on various boards including, HD Supply [Nasdaq: HDS], a $8.5 Billion enterprise value industrial distributor, 30% Club Steering Committee, an Angel Member of 100 Women in Finance.

*Mark W. Yusko, CEO & Chief Investment Officer, Morgan Creek Capital Management and Managing Partner, Morgan Creek Digital Assets*

Mark Yusko is the Founder, CEO and Chief Investment Officer of Morgan Creek Capital Management. He is also the Managing Partner of Morgan Creek Digital Assets. Morgan Creek Capital Management was founded in 2004 and currently manages close to $2 billion in discretionary and non-discretionary assets. Prior to founding Morgan Creek, Mr. Yusko was CIO and Founder of UNC Management Company (UNCMC), the Endowment investment office for the University of North Carolina at Chapel Hill. Before that, he was Senior Investment Director for the University of Notre Dame Investment Office. Mr. Yusko has been at the forefront of institutional investing throughout his career. An early investor in alternative asset classes at Notre Dame, he brought the Endowment Model of investing to UNC, which contributed to significant performance gains for the Endowment. The Endowment Model is the cornerstone philosophy of Morgan Creek, as is the mandate to Invest in Innovation. Mr. Yusko is again at the forefront of investing through Morgan Creek Digital Assets, which was formed in 2018. Morgan Creek Digital is an early stage investor in blockchain technology, digital currency and digital assets through the firm’s Venture Capital and Digital Asset Index Fund. Mr. Yusko received a BA with Honors from the University of Notre Dame and an MBA in Accounting and Finance from the University of Chicago.
TII MEMBERSHIP PRICING INFORMATION
(Spring 2020 to Fall 2020 Cycle)

Annual Membership Pricing Includes Passes to the Two Forums Listed Below
The Spring Investment Institute Forum: May 18-19, 2020 at The Carolina Inn, Chapel Hill, NC
The Fall Investment Institute Forum: October 26-27, 2020 at The St. Regis Hotel, Atlanta, GA

Investors/Allocators/Asset Owners
This level is ONLY AVAILABLE to full-time EMPLOYEES of Endowments, Foundations, Hospitals/Healthcare, Corporate and Public Pension Funds, Other Non-Profits, Single Family Offices, Sovereign Wealth and Qualified High-Net-Worth Individuals. If you or your firm sells products or funds to institutional and/or private investors, please review the other registration categories for the appropriate pricing level. TII has the right to qualify all attendees at this option.

$425.00 This annual membership fee includes up to three access passes for your organization to attend BOTH Forums (6 passes total)

$295.00 – INVESTOR / ALLOCATOR ONE-TIME PASS TO THE SPRING 2020 PROGRAM
I am an investor / allocator who falls under one of the categories listed above and would like to purchase a single one-time pass to attend the Spring Forum 2020 without joining annual membership. (This option is not available to consultants, managers and service providers.)

Consultants, Multi-Client Family Offices
$1900.00 This annual fee includes one access pass for your organization and one investor client pass to BOTH Forums
$2700.00 This annual fee includes two access passes for your organization and one investor client pass to BOTH Forums

Emerging Managers (< 300 Million AUM) & Outsourced CIO Providers
$5600.00 This annual fee includes one access pass for your organization and one investor client pass to BOTH Forums
$7600.00 This annual fee includes two access passes for your organization and one investor client pass to BOTH Forums

Managers > 300 Million AUM
This level includes Fund of Funds, Hedge Funds, Private Equity, Venture Capital, Real Estate, Traditional, Fixed Income and other asset management firms.
$7900.00 This annual fee includes one access pass for your organization and one investor client pass to BOTH Forums
$9900.00 This annual fee includes two access passes for your organization and one investor client pass to BOTH Forums

Service Providers
This level includes Accounting Firms, Prime Brokers, Fund Administrators, Attorneys, Third Party Marketers, Investment Research Firms, Software and other vendors. A very limited number of service provider firms will be taken each year.
$12,500.00 This annual fee includes up to two access passes for your organization and two investor client passes to BOTH Forums

Important Note Regarding Passes:
When purchasing the two-pass option, please be aware that at least one pass must be used for a member of the senior investment team who is responsible for managing a portfolio at your firm and who does not wear the marketing/sales/investor relations hat. Only one marketing professional from each member organization will be allowed access to each forum. If you are interested in registering an additional marketing person, please contact us regarding sponsorship opportunities.

Cancellations/Substitutions:
Annual membership dues are non-refundable. In the event that you cannot use your passes throughout your membership cycle, there will be no refunds for cancellations or no-shows to our forums. You may, however, substitute a participant from your own or a similar organization by emailing admin@theinvestmentinstitute.org.
MEMBERSHIP INFORMATION
Andrea Szigethy, Founder & CEO, The Investment Institute
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General Inquiries: Website: www.theinvestmentinstitute.org / Email: admin@theinvestmentinstitute.org

MEETING LOGISTICS – https://theinvestmentinstitute.org/spring-2020-event-info/

IMPORTANT! PLEASE REGISTER YOUR ATTENDEE(S) FOR THE SPRING FORUM!
If you have already registered your organization for your annual Membership through the Membership Registration Form but have not yet submitted the Attendee Registration Form for each person planning to attend the Spring conference, please do so ASAP! The Attendee Registration Form link was provided in the auto confirmation email you should have received from admin@theinvestmentinstitute.org when you registered for Membership. If you cannot locate the link, please email us and we will be happy to forward it to you! *We need to receive an Attendee Registration Form from every Member, Speaker, Sponsor and Investor Client Guest. (For details on Investor Client Guests and all other conference info, please visit: https://theinvestmentinstitute.org/spring-2020-event-info/)

DOWNLOAD OUR NEW EVENT APP ON YOUR MOBILE DEVICE / DELETE & RE-ADD IF YOU HAVE IT ALREADY!
Please search the App Store or Google Play to add “The Investment Institute” app to your mobile device. If you already had the app, please delete and re-add it so that you will have the updated version with your personal profile going forward – otherwise you will only have access to old data. The app will request that you log in with your name and email address (this contact info will not be shared with anyone) – we highly suggest that you do so as we will continue to add features to the app as they become available to us and some will only be available to you if you create your own profile in the app. Use the menu guide on the home screen to view the agenda, speaker bios, white papers, presentations, sponsor information and much more! Agenda details and other items will be added to the App as they become available. Please note: Allowing the app to send you notifications will ensure you receive any onsite updates as well.

MEETING VENUE AND CLOSEST AIRPORT: The Spring Investment Institute Forum will take place at The Carolina Inn in Chapel Hill, NC. The Carolina Inn is a 25-minute drive (depending on traffic times) from the Raleigh-Durham International Airport (RDU). Driving directions and parking info can be found here. Please see below regarding hotel reservations information.

HOTEL ACCOMMODATIONS – PLEASE BOOK ASAP: All attendees are responsible for arrangement and payment of their own travel reservations and hotel accommodations. The Carolina Inn (our conference venue) is offering discounted room rates for a limited time and we anticipate the room block will sell out quickly, on or prior to February 1st. Please click here to reserve a room in our discounted block at The Carolina Inn. Please note regarding hotel room availability: If our room block is sold out, we suggest contacting The Carolina Inn directly for rooms outside of our block or exploring other hotel options. Please click here for other hotels in the area.

TRANSPORTATION BETWEEN RDU AIRPORT AND THE CAROLINA INN: Individuals are responsible for arrangement and payment of their own travel to and from the forum. Taxis are available outside of baggage claim at RDU Airport. Click here for RDU Airport Ground Transportation Information. Additional private transportation options include RDU Taxi at 919.840.7277 and Carolina Livery at 919.957.1111. You can also contact The Carolina Inn’s Guest Services Department at 919.933.2001 to assist with any questions or requests.

SUGGESTED ATTIRE: Business casual attire is suggested for the conference on May 18-19, 2020. Please come either in your business casual attire or feel free to dress more comfortably to dinner at Kipos Greek Taverna (jeans are welcome) on May 18th.

IMPORTANT POLICY NOTES: The Investment Institute reserves the right to qualify any attendees registering for this event. There will be no refunds for cancellations or no-shows. You may substitute a participant from your own or a similar organization.

MEDIA & PRESS: Media and Press are not permitted at The Investment Institute Forums.

CPE CREDITS OFFERED – Available Credits: TBD credits for Monday, TBD credits for Tuesday, TBD for Allocators’ Breakfast on Tuesday
The Investment Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.
UPCOMING MEMBERSHIP FORUMS!

The Spring Investment Institute Forum  
May 18-19, 2020  
The Carolina Inn  
Chapel Hill, NC  
(Membership Required to Attend)

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Atlanta, GA  
(Membership Required to Attend)

For More Information on Joining our Community  
www.TheInvestmentInstitute.org
EDUCATIONAL FORUMS THAT INSPIRE A CULTURE OF COLLABORATION AND COMMUNITY AMONG INSTITUTIONAL INVESTORS, FAMILY OFFICES, CONSULTANTS AND ASSET MANAGERS

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